

APPLICATION FOR RECORDS DISPOSITION STANDARD

INSTRUCTIONS: Prepare in duplicate and forward to the Records Management Analyst, Management Systems Division

3. Dept., Division, Subdivision & Administering Office Address MARTA Finance and Administration Division of Personnel 401 West Peachtree Street, NE - Suite 2200 Atlanta, Georgia 30308		FOR RECORDS MANAGEMENT DIVISION USE Date Received Application No. Date Completed SEP - 5 1978 78-205 SEP - 8 1978	
4. Person to Contact James A. Merritt <i>James A. Merritt</i>		5. Working Title Manager of Benefits	6. Telephone Number 586-5234
7. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
8. Dates of Series Earliest Latest 1972 Present	9. Records Series Title (followed by title used in office, if different) File Employee Insurance Benefits / (Union & Non-Union Employees)		
10. Division and Office Function What is the function of the Division and the Office in which this record series is created? The Division of Personnel is responsible for the establishment and administering of personnel procedures for the Authority. The Division of Personnel develops and maintains adequate recruitment sources to meet the manpower needs of the Authority. It maintains personnel records, with the exception of the Division of Transportation and Maintenance. Specifically, it develops, implements and monitors the Authority's compensation and benefit programs, employee performance evaluation plan and a continuing employee relations program for personnel at all levels within the Authority. Also, this division monitors and enforces the Authority's Affirmative Action Program.			
11. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: developing and administering insurance benefits for Union and Non-Union employees. Included are: Copies of Insurance contracts, insurance billings, general correspondence to and from insurance companies; life, health and disability surveys, experience reports, claims information and other insurance information. File is arranged: Alphabetically by subject by year			
12. Monthly Reference Rate How often are records referred to which are: One to six months old 10 ; Seven to twelve months old 5 ; Thirteen to twenty-four months old 0 ; twenty-five months and older ?			
13. Annual Rate of Accumulation of Records Letter-size drawers 1 ; Legal-size drawers _____ ; Shelves _____ ; Other (specify) _____			

YES	NO	14. Questionnaire (Place an "X" in the proper column)
XX		a. Is this the official copy of the series? If not, where is it?
	XX	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	XX	c. Is this a vital record?
	XX	d. Does this series have historical or long term research value?
	XX	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	XX	f. Is the information contained in this series ever published? If yes, attach copy.
	XX	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
	XX	h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?
	XX	i. Is this series (or a major portion of it) regularly microfilmed?
	XX	j. Does the record series result in a computer printout?
15. Retention Requirements The following requires the series to be kept:		
a. State Law	_____ years.	d. Audit period <u>1</u> years.
b. Statute of limitation	_____ years.	e. Administrative need <u>10</u> years.
c. Federal law	_____ years.	f. Federal retention instructions _____ years.
Attach copy or excerpt of laws or regulations. Explain administrative need.		
16. Approved Disposition Instructions This agency recommends that the file series be cut off at the end of each:		
<input checked="" type="checkbox"/> Calendar Year; <input type="checkbox"/> Fiscal Year; <input type="checkbox"/> Other _____ then,		
<input checked="" type="checkbox"/> Hold in the current files area _____ month(s) <u>1</u> year(s); then		
<input type="checkbox"/> Transfer to local holding area; hold _____ year(s); then		
<input checked="" type="checkbox"/> Transfer to State Records Center; hold <u>9</u> year(s); then		
<input checked="" type="checkbox"/> Destroy.		
<input type="checkbox"/> Transfer to State Archives for permanent retention.		
<input type="checkbox"/> Other (Specify) _____		
These instructions apply to all prior and future accumulations of the series.		
(Indicate briefly rationale for recommendations above/or write additional remarks):		
17. APPROVALS		
Approved	Department Records Management Officer	Date
	<i>Jerry Winfrey</i>	<i>7/19/78</i>
Approved	Division Head/Designee	Date
	<i>[Signature]</i>	<i>7/20/78</i>
Approved	Department Head/Designee	Date
	<i>Robert C. D.</i>	<i>7/21/78</i>
Approved	Records Management Analyst	Date
	<i>Carolyn J. Haik</i>	<i>7/19/78</i>
Approved	Legal Counsel	Date
	<i>Wayne Crowder</i>	<i>8/28/78</i>
Approved	Division of Audit	Date
	<i>[Signature]</i>	<i>8/29/78</i>
Approved	Department of Archives and History	Date
	<i>Carroll Hart</i>	<i>9-8-78</i>
Approved	MARTA Management Advisory Committee	Date